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ABSTRACT

This document is one of a series of student workbooks developed for workplace skill development courses or workshops by Mercer County Community College (New Jersey) and its partners. Designed to help customer service employees who use the telephone in a hospital, this telephone tips course discusses dealing politely and effectively with callers and provides tips for making calls. The materials for the 4-hour course include a course outline, objectives, a topical outline, a telephone management checklist, and the following information sheets: quality patient service, the importance of the telephone in the hospital, telephone courtesy, letting your voice smile, voice self-assessment, your voice inflection, answering business calls, addressing the caller, planning and placing business calls, placing calls on hold, transferring calls, taking telephone messages, and ending a conversation. (KC)

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WINNING TELEPHONE TIPS

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OVERVIEW OF WORKPLACE LITERACY PROJECT

Skills for Tomorrow, NOW

The Workplace Literacy Project resulted from a Department of Education grant, plus in-kind contributions from a partnership with General Motors Inland Fisher Guide Plant, Princeton Plasma Physics Laboratory, and St. Francis Medical Center. The project is an attempt to find solutions to the growing "skills gap" in industry today. More than 25 million Americans cannot read the front page of a newspaper. In addition, workers whose average ages are rising, must produce in a technological environment that may not have existed when they began working. This lack of knowledge makes it difficult to compete in a technologically changing workplace. Moreover, an increasing number of immigrants have entered the workforce with limited English communication skills. In response to this growing need, the Federal government provided a grant to Mercer County Community College and its partners to develop ways to enrich and expand employees' basic workplace knowledge. The aim of the project was also to improve the self-esteem of the participants.

Support for the project was solicited from all levels of company management and the unions. In addition, an advisory council, comprising key management and employees from each company determined the design, goals, and time-frame of the project. Each company provided a liaison person from their site, and MCCC hired a director to manage the program. Employee release time for classes was site-specific.

Participation in the program was voluntary. Information about classes was disseminated through company letters, flyers, union notices, notices included with paychecks, and open forums with supervisors and employees.

The ABLE test was used for normative pre and post testing. Other types of evaluations varied from course to course. MCCC counselors met with each student to discuss present and future educational objectives.

Courses were offered in reading, business writing, math, science, and English as a Second Language. In addition, there were workshops in problem solving, stress management, and other work survival skills. The curricula for the courses were customized for each worksite to be as job focused as possible.

It is our hope that this program will serve as a model for other organizations to empower their employees with the skills needed to succeed in the changing technological workplace, today and in the future.

COURSE OUTLINE

WINNING TELEPHONE TIPS

Describes ways of improving the skills of customer service staff who use the telephone in a hospital setting. Identifies tips for dealing politely and effectively with callers. Identifies tips for making calls. (While this course is aimed directly at a hospital staff, the material is appropriate for operators, receptionists, and secretaries in any workplace.)

OBJECTIVES

Upon completion of this course, students will be able to:

- Understand the importance of their role in providing quality service
- Recognize the seven c's of effective telephone service
- Speak on the telephone in a warm, friendly voice that communicates a positive personality
- Handle incoming calls effectively
- Place callers on hold and transfer incoming calls in a courteous and efficient manner
- Take clear and complete phone messages
- Listen effectively to callers
- Understand the art of asking questions
- Recognize and manage caller behavior
- Recognize that attitude is your key to success

TOPICAL OUTLINE

- Telephone management checklist
- The importance of quality service
- The importance of the telephone in the hospital
- Telephone courtesy
- Let your voice smile
- Answering business calls
- Addressing the caller
- Planning and placing business calls
- Placing calls on hold
- Transferring calls
- Taking telephone messages
- Wrapping it up without being rude

OTHER

- 4 hours

WORKSHOP OBJECTIVES:

At the completion of this workshop, participants will be able to do the following:

* Understand the importance of their role in providing quality patient service.
* Determine the importance of the telephone in the hospital.
* Recognize the seven C's of effective telephone service: caring, confident, considerate, committed, creative, controlled, and contagious.
* Speak on the telephone in a warm, friendly voice that communicates a positive personality.
* Improve their handling of incoming calls.
* Place callers on hold and transfer incoming calls in the most courteous and efficient manner.
* Take clear and complete phone messages.
* Listen effectively to the caller.
* Understand the art of asking questions.
* Recognize and manage caller behavior.
* Recognize that attitude is your key to success.

TELEPHONE MANAGEMENT CHECKLIST

Give yourself 5 points for OFTEN, 3 points for SOMETIMES, and 1 point for RARELY. Total the column and give yourself a score based on 95 points.

_____ 1. I try to answer the telephone before the third ring?

_____ 2. I identify the department and my name when answering?

_____ 3. I use the caller's name during our conversation?

_____ 4. I ask rather than tell callers regarding the holding and transferring of their calls?

_____ 5. I apologize sincerely for the callers' inconvenience?

_____ 6. I take the time needed when dealing with special cases; such as, English as second language persons, angry persons, etc.

_____ 7. I feel comfortable with my behavior when dealing with angry callers.

_____ 8. I keep my speaking speed at a level of understanding.

_____ 9. I have the necessary equipment within reach of my phone.

_____ 10. I establish best times for call backs making it easier for the caller to reach either me or the person needed.

_____ 11. My peers would describe me as warm, precise, persuasive, convincing, and sincere over the phone.

_____ 12. I get all the information needed on the first call.

_____ 13. I treat all kinds of messages as important calls.

_____ 14. If necessary for the caller to wait longer than a minute while I leave the phone, I offer to return the call.

_____ 15. I try to be informative when taking calls for others.

_____ 16. I take time to speak directly into the phone--clearly, naturally, and pleasantly.

_____ 17. Before leaving my phone, I leave word where I am going and when I plan to return.

_____ 18. When taking messages, I note all essential information,

QUALITY PATIENT SERVICE

Quality patient service is provided by a person like you. A person who:

1. Accepts responsibility for providing timely patient service in a courteous manner.
2. Understands that the success of the hospital depends on good patient service.
3. Learns and practices patient service skills in a positive manner.

PATIENT SERVICE IS EVERYONE'S RESPONSIBILITY

When we think about patient service, it is common to think that certain individuals or departments are the only ones responsible for providing that service. However, in most hospitals patient service departments represent only a portion of the overall service responsibility. Everyone, from chairman to security guard provides patient service, and as such contributes to a hospital's reputation for service and courtesy.

Learning good techniques and skills is essential; but not as important as applying what has been learned on a daily basis.

THE IMPORTANCE OF THE TELEPHONE IN THE HOSPITAL

Think a moment about the role of the telephone where you work. Chances are it would be difficult to conduct business without it. Although there are times we need to meet face to face with patients, the telephone is probably responsible for most patient contacts.

On an average day, do you know what portion of your patients receive service over the telephone as compared to being contacted in person by a representative of the hospital? Although hospitals differ, it is not unusual to have more than 70% of patient contact provided by telephone.

If your hospital happened to be one where a majority of patients contacts are by telephone; do you know who is primarily responsible for the hospital's patient service reputation?

_____ Those who meet face to face with patients?

_____ Those who talk with patients on the telephone?

_____ Managers and supervisors?

Having answered this, who then in your opinion is responsible for providing good patient service?

_____ me _____the supervisors _____ the accounting department

_____ officers of the hospital ____our telephone operators

_____our nurses _____the patient service department

TELEPHONE COURTESY

When you use the business telephone, you are the voice of the hospital. In each conversation, you are creating an impression of your hospital through another "door" -- your telephone. What you say and how you say it determines the mental image formed by those you come in contact with by telephone.

Telephone courtesy is simply and extension of the thoughtfulness which is practiced in everyday life. The basic elements of telephone courtesy are the same as those present in face-to-face contact; but they must be expressed by your voice alone. Politeness, kindness, consideration, and respect for others are the foundation points.

Telephone courtesy is expressed by the seven C's of effective telephone service:

* **CARING** toward the patient, hospital, and me. (If I take good care of myself, I can take care of the caller.)

* **CONFIDENT** in the way I handle people using both my technical (knowledge of job) and interpersonal (human relations) skills.

* **CONSIDERATE** caring about the emotions of callers even when I do not agree with what they are saying.

* **COMMITTED** to going the extra step for the caller.

* **CREATIVE** in satisfying the caller's request and in problem solving.

* **CONTROLLED** when it comes to my emotions. Remaining calm and taking anger professionally not personally.

* **CONTAGIOUS** with my enthusiasm and interest toward the caller.

LET YOUR VOICE SMILE

Every time you make or receive a telephone call at work, you are representing the hospital. The impression you create can be a lasting one, so you will want to make your voice and manner always show you are your alert and attractive best.

When you are warm and friendly, courteous and tactful, you stand out as someone special. You are the hospital's image.

Five ways to Sound as Good as YOU really are:

* **ALERTNESS**-show that you are wide-awake, ready to help the person on the line.

* **PLEASANTNESS**-put a SMILE on your face and it will become a smile in your voice.

* **NATURALNESS**-use simple, straightforward language. Avoid technical terms and slang.

* **DISTINCTNESS**-speak directly into the telephone transmitter, pronouncing your words clearly.

* **EXPRESSIVENESS**-talk at a moderate rate and volume, but vary your tone of your voice.

VOICE SELF-ASSESSMENT

Your voice reflects your personality. If it needs improvement you can do it, but you must be willing to try. Practicing voice techniques is no different than practicing a sport. If you stay at it, you've bound to improve.

Rate your voice using the following self evaluation. Check those characteristics that apply to you, and then ask a friend to help evaluate your responses.

My Voice:

DESIRABLE TRAITS		UNDESIRABLE TRAITS	
is pleasant sounding	____	is nasal	____
has pitch variations	____	sounds throaty	____
has a normal rate	____	is raspy	____
varies in volume	____	sometimes squeaks	____
has distinct articulation	____	boring monotone	____
sounds like I am smiling	____	is too weak	____
has ample force	____	is too loud	____
stresses proper accents	____	has too many pauses	____
		does not convey a smile	____

For any undesirable traits checked, you should begin work on correcting them.

YOUR VOICE INFLECTION

Read the following sentence in your normal voice:

"Jimmy didn't show up for work this morning."

Now restate the same sentence with "surprise" in your voice.

Try it again, but this time make it a "casual" statement.

Next, make it sound like a "secret."

Finally, turn it into a "question."

If done properly, as your inflection changes, the sentence will convey a completely different meaning to the listener.

ANSWERING BUSINESS CALLS

Why do hospitals attempt to answer the telephone calls promptly?

* An indication of an alert, efficient operation.
* An expression of a desire to be of service.
* Avoids wasting the caller's time.
* Avoids disturbing others in the office.

How many times should the telephone ring before answering it?

* Two or three times.
* Remember to smile before answering.

How should identification be given when answering a business telephone?

* Identify your department
* Introduce yourself
* Offer help
    * "X-ray Department, Jane Smith, May I help you."
    * "Accounting Office, Harry Black, How may I help you."

How should I close the conversation?

* "Thank you for calling, Mr. Levy."
* "I'm glad I was able to help you. Goodbye."
* "You're welcome, Mr. Rogers. Goodbye."

ADDRESSING THE CALLER

The average caller may or may not be sensitive about how he or she is addressed. To be on the safe side keep these suggestions in mind"

1. When addressing a male you are always correct to us Mr. or Sir.

2. Addressing a woman is more confusing. The use of Mrs. or Miss is common and generally acceptable. Some women prefer Ms. and may request this form of address. If you are uncertain, simply ask the caller her preference.

3. Often when you ask for the correct form of address the caller will suggest the use of a first name. The use of the client's first name is then acceptable. Use of a first name may also be acceptable (but not always) when:

    * You have established a good rapport over a period of time.

    * You have been called by your first name.

    * You know the caller, and know he/she is comfortable with a first name basis.

PLANNING AND PLACING BUSINESS CALLS

What points should be considered when planning business calls?

*Purpose
*Whom to call
*Information to be given (descriptions, information, dates, etc.)
*Questions to be asked
*Necessary materials (files, calendar, appointment schedule, notes on points to be discussed)
*When to call (time zones, business hours)

PLACING CALLS ON HOLD

There are many occasions when you have to ask callers to wait or hold while you tend to another duty. You might have to answer another incoming call, obtain information for the caller, or you may be screening the call for your supervisor. Whatever the reason, you must handle the situation correctly to avoid irritating the caller. Follow these steps:

*Ask if you may place the caller on hold before you do it. You have no way of knowing whether this will be acceptable to the caller or not.

"May I put you on hold, please? I need to check the files for that information."

If you need to be away from the conversation for more than half a minute, return and ask if the caller wishes to remain on hold. Continue to do this in the event of an extended delay.

"Are you able to continue holding?"

*When you are able to return, reestablish the tone of the communication.

"Mr. Dunn, thank you for being so patient. I have the information you need."

TRANSFERRING CALLS

Sometimes you need to transfer calls within the hospital. This happens often when the caller requires information or service that you cannot provide. You need to manage the potentially annoying situation smoothly.

* Explain the reason for the transfer.

  "Ms. Jones, I am transferring your call to Bill Bradley in the Out-Patient Department. He should be able to help you."

* Before you transfer the call, give the caller the name and telephone number to where you are transferring them in case the call is disconnected.

  "I am transferring your call to John Smith for your future reference the number is 575-1314."

* Before you transfer the call, give as much information as you are able to the person who will be receiving the call. This saves repetition and creates the possibility of a more productive exchange.

  "Mr. Bart, I have Mr. Smith on the line from Trenton Times. He wants to talk to you about the flu season."

TAKING TELEPHONE MESSAGES

The quality of the message taken will often determine how productive the next communication will be. Follow this rule and you will do fine.

Take phone messages for others as you would like to have them taken for you when you are away from your desk.

The most common problem with phone messages in businesses and hospitals are that they are either incomplete or illegible. To protect against both these pitfalls, you need to take your time with the caller to obtain total information. Ask questions and repeat names and numbers to be certain they are correct. Above all, write or print the message clearly.

Most offices provide standard forms. Although forms vary, the person receiving the message needs the following information:

* The name of the caller along with his/her title and company if they are not a patient.
* The date and time of the call.
* The complete phone number of the caller.
* The message, presented clearly and concisely.
* The name of the person who took the message.

TO _____

TIME _____ DATE _____

While you were out

MR. _____

OF _____

TELEPHONED	
PLEASE CALL HIM	
WILL CALL AGAIN	
STOPPED IN	
SEE HIM	

TELEPHONE NUMBER

TIME _____ DATE _____

MESSAGE:

#319
#27917

WRAP IT UP WITHOUT BEING RUDE!

Has this happened to you? You have gotten the caller to the point and have kept the conversation on course. You have finished the real business of the call but your caller keeps talking. You don't want to sound rude, but you do need to end the conversation and get back to other work.

Here are the techniques that get you around this roadblock:

1. **Talk in the past tense.** You can say, "It has been good talking to you," or. "This has been a very productive call," or, "I'm glad we had a chance to talk."

2. **Close with points and promises.** Summarize the call. This is particularly effective when you want to conclude a call that covered a number of points. You can say, "To summarize what we've discussed," or, "Let me go over my understanding of the points we've agreed upon." You not only end the call, you avoid misunderstandings that can generate time-wasting callbacks.

3. **Spell out follow-up actions:** "I will follow-up on your suggestion and get back to you before noon tomorrow." "I appreciate your checking into that question for me and look forward to hearing from you before Friday."

4. **Say "Thank you."** This is a universal signal that the conversation has come to an end. Here are some suggestions: "Thank you for calling. Is there anything else we need to cover before we say 'goodbye'?"

Years ago, the etiquette books directed that the caller had responsibility for ending the call. That rule no longer holds true. In today's busy world, both the person calling and the person called have the responsibility for using time wisely. Even if you are the person called, it's correct to take the initiative in closing a call gracefully. Remember, you are saving the caller's time as well as your own.